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## **PURCHASING USER MANUAL**

## UPDATING OR CHANGING A PURCHASE ORDER

## INTRODUCTION

If you have saved (but not approved or ordered) a purchase order, you can add or remove items, or make modifications such as adding or changing vendor, updating the price or description of items, etc. A purchase order that has been approved or ordered cannot be changed, but can be voided (if, for example, items that have not been received need to be added to a new PO).

## TO UPDATE OR CHANGE A PURCHASE ORDER

After you have saved a purchase order, you can open it to finish adding requisition items.

1. Click the **PO Status** tab.

Figure 1 - PO Status

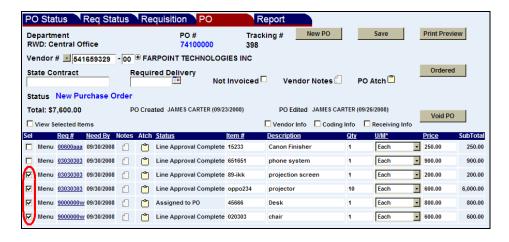


- 2. Browse the list of purchase orders to find and select the one you need.
- 3. Click **Edit** or **Order**. (Typically the status of a saved purchase order is **In Purchasing**.)
- 4. The purchase order will open on the **PO** screen.
- 5. Uncheck the **View Selected Items** check box.

Figure 2 - View Selected Items



All available requisition items will be displayed.



You can make several changes to your purchase order (NOTE: You cannot change the fiscal coding. You would have to reject the line items using the **Menu**.):

- a. Check the **Sel** check box next to any line item you want to add to your purchase order.
- b. Uncheck the **Sel** check box next to any line item you want to remove you're your purchase order.
- c. Change the **Item #, Description**, **Qty**, **U.M.**, or **Price** on any selected item as needed.
- d. Click the asterisk next to the **Vendor** # field to **Find** and **Select** a vendor you want to use
- e. If needed, click **Menu** next to a line item to take separate actions on each line tem. You can also select this menu after you have saved the line items on a purchase order. See the Purchase Order Line Item Menu section below.
- f. If necessary, you can change the quantity (**Qty**) and/or the unit of measure (**U.M.**) on a line item if, for example, an item is only available in a certain quantity.
- g. Click **Save**. You can continue to make changes until you are satisfied that the purchase order is complete or you can save it to come back to later.
- 6. After the purchase order is saved, do the following depending on your agency's process:
  - Click **Complete**. This button is displayed if you are a Purchaser but not a PO Approver and your agency requires that your purchase orders be approved. The designated purchase order approver must approve them.
  - Click **Approve**. This button is displayed if you are a Purchaser and a PO Approver and your agency requires that your purchase orders be approved.
  - Click **Ordered**. This button is displayed if your agency does not require purchase order approval.